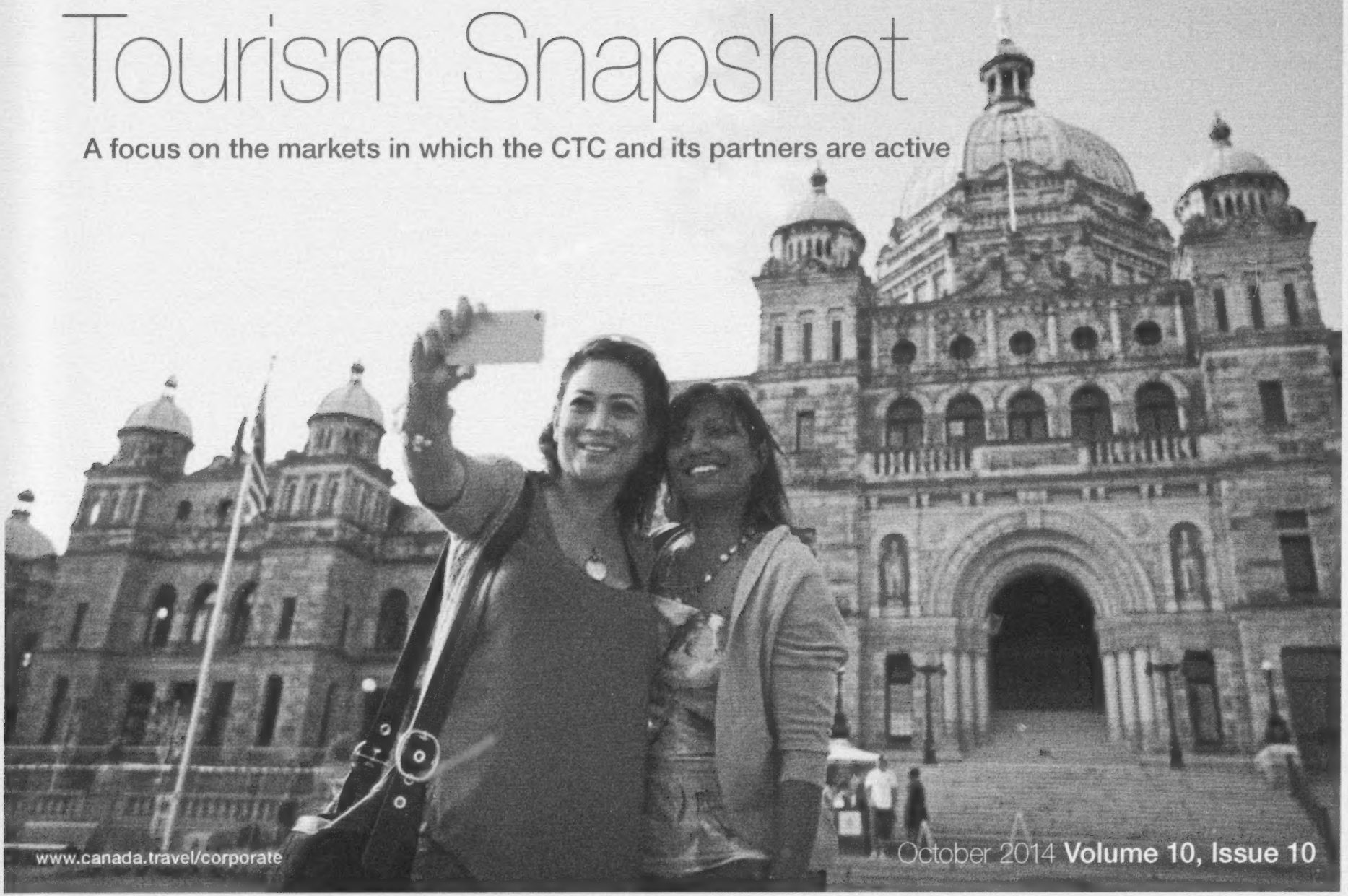
Canadian Tourism Commission | Commission canadienne du tourisme

Canada

Tourism Snapshot

A focus on the markets in which the CTC and its partners are active



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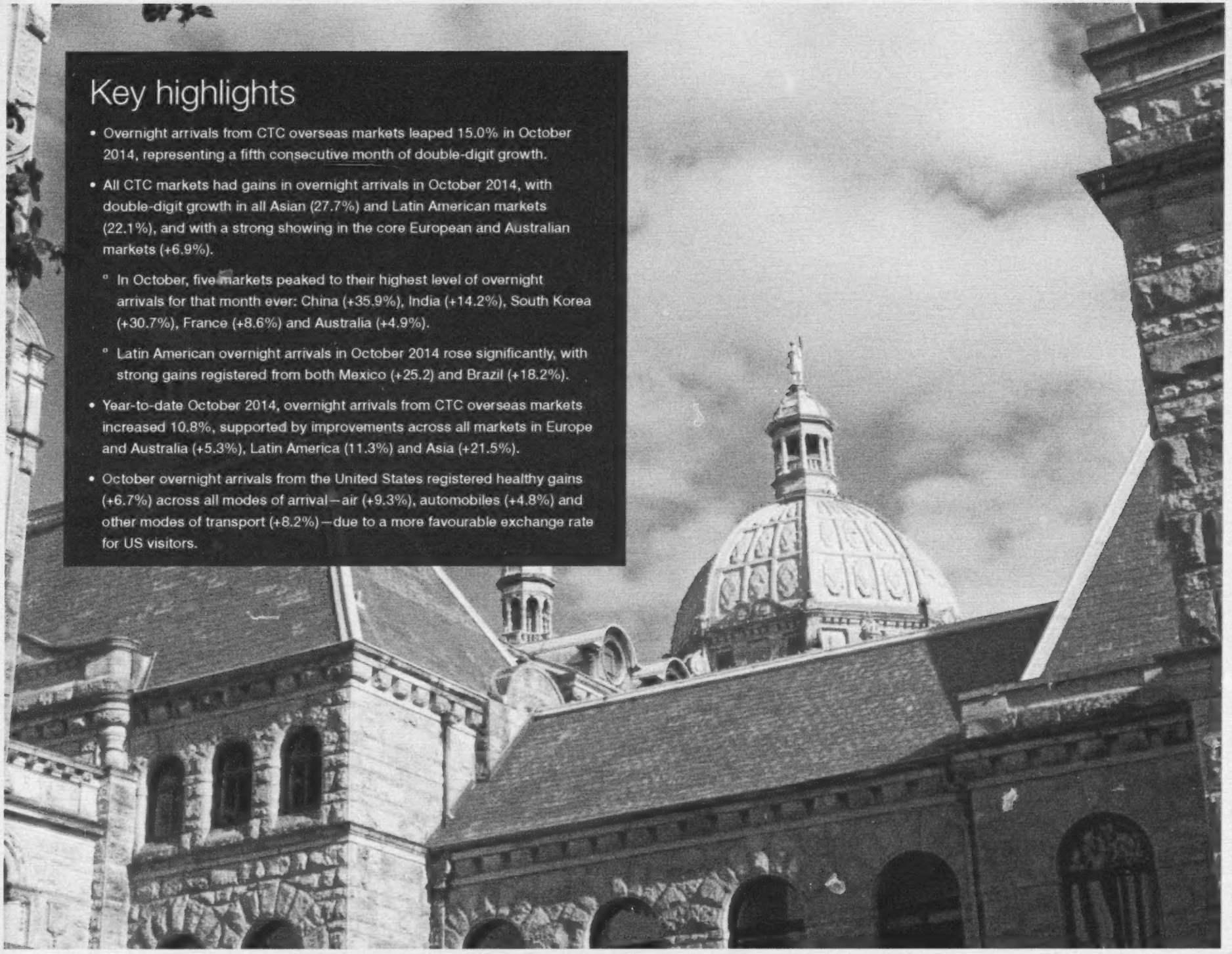


Key highlights

- Overnight arrivals from CTC overseas markets leaped 15.0% in October 2014, representing a fifth consecutive month of double-digit growth.
- All CTC markets had gains in overnight arrivals in October 2014, with double-digit growth in all Asian (27.7%) and Latin American markets (22.1%), and with a strong showing in the core European and Australian markets (+6.9%).
  - In October, five markets peaked to their highest level of overnight arrivals for that month ever: China (+35.9%), India (+14.2%), South Korea (+30.7%), France (+8.6%) and Australia (+4.9%).
  - Latin American overnight arrivals in October 2014 rose significantly, with strong gains registered from both Mexico (+25.2) and Brazil (+18.2%).
- Year-to-date October 2014, overnight arrivals from CTC overseas markets increased 10.8%, supported by improvements across all markets in Europe and Australia (+5.3%), Latin America (11.3%) and Asia (+21.5%).
- October overnight arrivals from the United States registered healthy gains (+6.7%) across all modes of arrival—air (+9.3%), automobiles (+4.8%) and other modes of transport (+8.2%)—due to a more favourable exchange rate for US visitors.

Tourism review* Inbound highlights

Overnight trips to Canada

	Oct. 2014	14/13 Oct. % Change	Jan. - Oct. 2014	Year-to-date % Change
United States				
Automobile	484,840	4.8	6,029,817	-1.3
Air	323,660	9.3	3,518,028	7.6
Other	96,033	8.2	1,186,589	-6.3
US Total	**904,533**	**6.7**	**10,734,434**	**0.9**
Core Markets				
UK	50,285	9.2	604,099	5.0
France	39,315	8.6	432,550	4.9
Germany	25,100	1.2	301,994	6.0
Australia	16,333	4.9	242,494	5.7
Core Total	**131,033**	**6.9**	**1,581,137**	**5.3**
Asia/Latin America Markets[1]				
Japan	27,928	21.8	231,047	14.7
South Korea	15,801	30.7	144,845	13.1
Mexico	9,535	25.2	151,494	14.8
Brazil	6,998	18.2	85,101	5.5
China	35,826	35.9	405,785	29.9
India	9,929	14.2	154,314	20.0
Asia/Latin America Markets Total	**106,017**	**26.8**	**1,172,586**	**19.3**
Overseas Key Markets	**237,050**	**15.0**	**2,753,723**	**10.8**
Total 11 CTC Markets	**1,141,583**	**8.3**	**13,488,157**	**2.7**
Other Overseas Countries	137,774	10.3	1,698,853	7.8
Non-US Countries	374,824	13.2	4,452,576	9.6
Total Countries	**1,279,357**	**8.5**	**15,187,010**	**3.3**

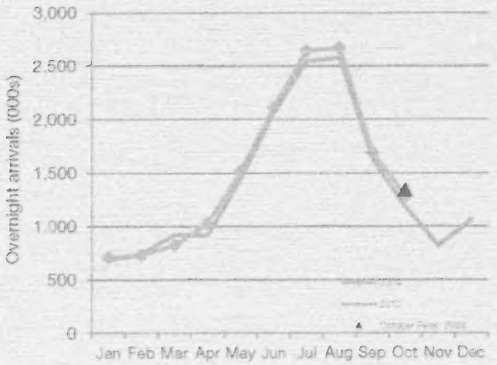
Note: Statistics Canada preliminary estimates.

[1] In previous editions, Asia/Latin America Markets were referred to as "Emerging/Transition" Markets. The name was changed to more effectively reflect the reality of these markets.

Source: Statistics Canada, International Travel Survey.

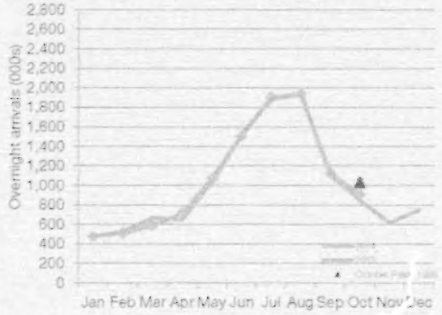
* **Competitive review:** Information for this section of the report was unavailable at time of writing due to delays in the releases of inbound arrivals figures for the month of October from the Australian Bureau of Statistics (ABS) and from the US Office of Travel and Tourism Industries (OTTI).

International trips



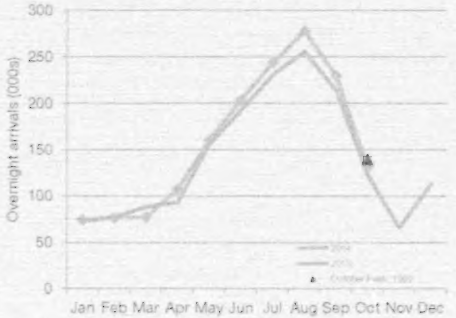
- Canada welcomed 1,280,000 international visitors in October, an 8.5% increase over October 2013. Of these visitors, 89% were from CTC markets.
- Year-to-date October 2014, Canada received approximately 15.2 million international visitors, up 3.3% compared to the same period last year.
- The visitor peak on record during the month of October occurred in 2004 with 1.34 million international visitors to Canada.
- In October 2014, overnight arrivals from CTC's Core markets increased 6.9%, with all four markets showing healthy gains. Year-to-date October 2014, arrivals from Core markets were up 5.3% over the same period last year to 1.58 million.
- Overnight arrivals from CTC markets in Asia and Latin America edged up 26.8% in October, thanks to strong growth from China (+35.9%), South Korea (+30.7%), Mexico (+25.2%), Japan (+21.8%), Brazil (+18.2%) and India (+14.2%). Year-to-date October 2014, arrivals from CTC's markets in Asia and Latin America rose 19.3% over the same period last year to 1.17 million.

United States



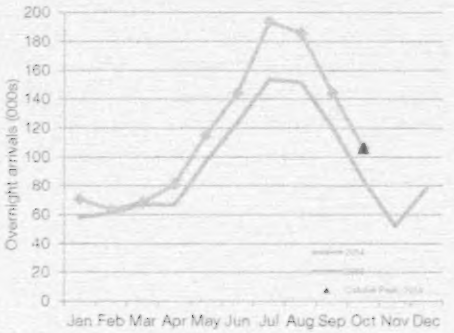
- In October 2014, strong gains were recorded in US arrivals by autos (+4.8%), air (+9.3%), and other modes of transport (+8.2%), resulting in a 6.7% increase in total US overnight arrivals. The strong gains from the US are partly attributable to the fall of the Canadian dollar relative to the US dollar in recent months.
- There have been 904,500 US visitors to Canada in October 2014. The US visitor peak on record during the month of October occurred in 1998 with 1.03 million overnight trips to Canada.
- Year-to-date October 2014, overnight arrivals from the US rose 0.9% compared to the same period last year to 10.73 million.
- Year-to-date October 2014, six provinces registered increases in border crossings with the largest gains in PEI (+19.6%), Nova Scotia (+16.2%), Newfoundland (+9.7%) and Alberta (+4.1%). US overnight arrivals to Canada increased by 90,928 in the first 10 months of 2014, with the bulk captured by BC, Quebec, Alberta and Nova Scotia.

Core Markets



- All CTC Core markets registered gains in October, with the UK posting the largest increase (+9.2%), followed by France (+8.6%), Australia (+4.9%) and Germany (+1.2%).
- Year-to-date October 2014, overall arrivals from Core markets increased 5.3%, with year-over-year gains from Germany (+6.0%), Australia (+5.7%), the UK (+5.0%) and France (+4.9%).
- In October 2014, Canada welcomed 131,000 visitors from CTC Core markets. This was nearly 6% lower than the peak of 139,000 visitors in October 2000.

Asia and Latin America



- The CAN+ visa program implemented in May in Mexico helped to account for the double-digit rise (+25.2%) in visitors from that country in October—the sixth consecutive month of double-digit growth.
- The upswing of arrivals from Japan (+21.8%) in October was partly facilitated by increased air capacity between Tokyo (Haneda) and Vancouver/Toronto in recent months.
- In October 2014, China (+35.9%) and India (+14.2%) continued to post strong numbers. The launch of the CAN+ visa program in India in July has facilitated double-digit growth in arrivals over the past few months.
- Arrivals from Brazil rose 18.2% in October over 2013, following a minor decline in September.
- Year-to-date October 2014, arrivals from CTC's markets in Asia and Latin America increased 19.3% over 2013, with all markets registering growth: China (+29.9%), India (+20.0%), Mexico (+14.8%), Japan (+14.7%), South Korea (+13.1%) and Brazil (+5.5%).
- In October 2014, the number of visitors from the six Asian and Latin American markets reached a peak for that month with about 106,000 visitors to Canada, surpassing the previous peak of 100,000 visitors established in 2004.

Peak Year Review of Overnight Trips to Canada by Market – January to October

	Core Overseas				United States		Asia and Latin America					
Markets	Australia	France	Germany	United Kingdom	Total	Air Only	Brazil	China	India	Japan	Mexico	South Korea
Previous Peak Year	2013	1996	1996	2007	2002	2005	2013	2013	2012	1996	2008	2007
Arrivals During Peak Year	229,383	434,466	427,310	812,920	13,836,067	3,398,467	80,683	312,371	130,110	588,279	237,811	176,005
Current Arrivals (YTD October 2014)	242,494	432,550	301,994	604,099	10,734,434	3,518,028	85,101	405,785	154,314	231,047	151,494	144,845
Current % of Previous Peak	105.7%	99.6%	70.7%	74.3%	77.6%	103.5%	105.5%	129.9%	118.6%	39.3%	63.7%	82.3%

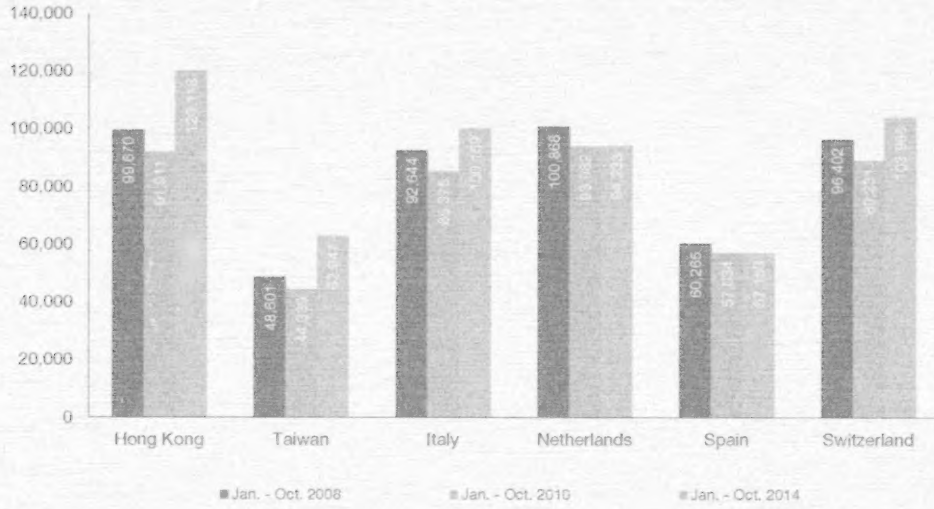
Note: Statistics Canada preliminary figures.
Sources: Statistics Canada; Tourism Australia.
Peak achieved during YTD October 2014

- Year-to-date October 2014, four markets—China, India, Brazil and Australia—achieved their highest level of overnight arrivals ever for the first 10 months of the year.
- Arrivals from the UK, Germany and the US achieved 70% to 77% of their respective YTD October peaks, recorded in 2007, 1996 and 2002 respectively.
- Arrivals from France reached 99.6% of the YTD October peak of 434,500 recorded in 1996.
- Arrivals from South Korea achieved 82% of the YTD October peak recorded in 2007.
- Year-to-date October 2014, US arrivals by air achieved a new peak with 3.52 million overnight visits to Canada, surpassing the previous record of 3.4 million visits recorded in 2005.
- Arrivals from Mexico were at 64% of the peak for the YTD October peak recorded in 2008.
- Arrivals from Japan were at 39% of the YTD October peak recorded in 1996.

Market Watch

- In October 2014, overnight arrivals from secondary European markets were all positive. Italy was the best performer (+14.6%), followed by Switzerland (+10.7%), Spain (+6.8%) and the Netherlands (+2.1%).
- Year-to-date October 2014, overnight arrivals from secondary European markets grew, led by Italy (+21.9%), and followed by Spain (+18.5%), Switzerland (+6.0%) and the Netherlands (+5.8%).
- Arrivals from Taiwan (+24.6%) and Hong Kong (+17.3%) recorded a second consecutive month of double-digit growth in October 2014.
- During the first 10 months in 2014, arrivals from Taiwan (+10.5%) and Hong Kong (+6.0%) expanded compared to the same period in 2013.

Overnight trips to Canada, by selected markets



Note: Statistics Canada preliminary estimates. Source: Statistics Canada, *International Travel Survey*.

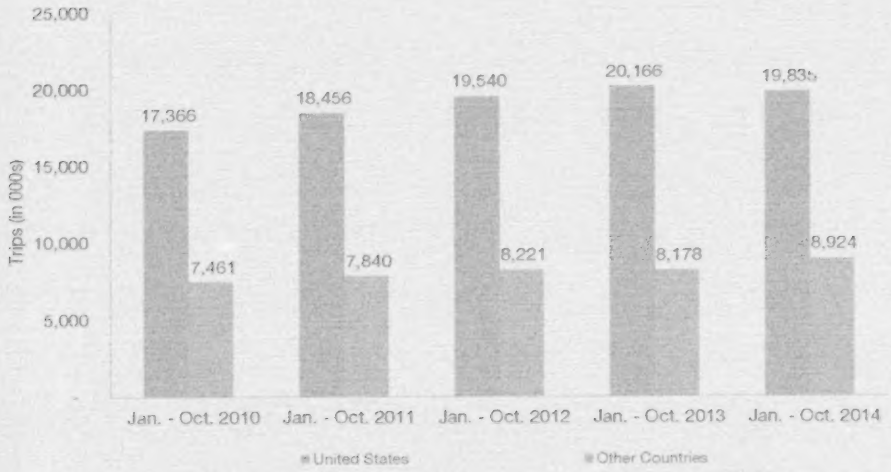
Overnight trips to Canada, by selected markets

	Oct. 2014	14/13 Oct. % Change	Jan. - Oct. 2014	Year-to-date % Change
Italy	7,713	14.6	100,159	21.9
Netherlands	6,736	2.1	94,233	5.8
Spain	3,636	6.8	57,153	18.5
Switzerland	7,607	10.7	103,966	6.0
Hong Kong	9,175	17.3	120,118	6.0
Taiwan	7,445	24.6	62,947	10.5

Note: Statistics Canada preliminary estimates.
Source: Statistics Canada, *International Travel Survey*.

Canadian outbound trips

Overnight trips by Canadians



Note: Statistics Canada preliminary estimates. Source: Statistics Canada, *International Travel Survey*.

- In October 2014, Canadian outbound travel increased 1.8% over the same month last year to 2.39 million trips.
- While the number of Canadians visiting the US during the month of October decreased 1.9% to 1.7 million trips, Canadian overnight travel to overseas destinations rose 12.4% to 690,000 trips.
- Year-to-date October 2014, overall outbound trips by Canadians grew 1.5% to 28.76 million trips as trips to overseas destinations (+9.1%) more than offset decreases to US destinations (-1.6%).
- In October 2014, most Canadians re-entered the country from the US through Ontario (792,086 entries, -0.5%), BC (353,110 entries, -2.3%) and Quebec (259,218 entries, -5.4%).
- In October 2014, the top three re-entry points for Canadians returning from overseas countries were Ontario, Quebec and BC. All three provinces recorded gains in numbers of re-entry, up 12.7%, 9.6% and 15.2% respectively.

Overnight trips by Canadians

	Oct. 2014	14/13 Oct. % Change	Jan. - Oct. 2014	Year-to-date % Change
United States	1,700,623	-1.9	19,835,134	-1.6
Other Countries	690,474	12.4	8,923,748	9.1
Total Trips from Canada	2,391,097	1.8	28,758,882	1.5

Note: Statistics Canada preliminary estimates.
Source: Statistics Canada, *International Travel Survey*.

Consumer outlook

Consumer confidence

- **Canada:** The index of consumer confidence declined by 3.9 percentage points in October to 84 (2002 = 100). The decline marked the fifth decrease in six months in Canada, indicating a loss of consumer confidence in the state of the Canadian economy.
- **USA:** The Conference Board Consumer Confidence Index®, which had declined in September, increased in October. The Index stood at 94.1 (1985=100) in October, up from 89.0 in September, indicating an improvement of consumer confidence in the United States.

Sources: Consumer Confidence Index, the Conference Board (USA), and Index of Consumer Confidence, the Conference Board of Canada.

Accommodations

- In October 2014, the National Occupancy Rate recorded an increase of 1.8 points to 67.8%. PEI registered the largest increase (+9.5 points), followed by Manitoba (+8.0 points) and Yukon (+5.6 points).
- Year-to-date October 2014, the National Occupancy Rate rose (+1.7 points to 66.2%) compared with the previous year. PEI (+3.3 points), Quebec (+2.9 points) and BC (+2.9 points) recorded the largest gains in hotel occupancy.
- Year-to-date October 2014, the National Average Daily Rate improved to $137.85, up 3.6% compared with the same period in 2013. Newfoundland and Labrador (+5.0%), PEI (+4.6%), BC (+4.3%) and Quebec (+4.0%) recorded the highest increases in average daily hotel rates.
- Year-to-date October 2014, the National Average Revenue per Available Room (RevPAR) was $91.23 (+6.4%), with PEI (+11.5%, $66.77) posting the largest growth, followed by BC (+9.1%, $93.78) and Quebec (+8.8%, $97.90).

Canadian Occupancy Rates, By Province*

	Oct. 2014	14/13 Change^	Jan. - Oct. 2014	Year-to-date Change^
Alberta[1]	71.9	-1.3	69.3	0.2
British Columbia	62.0	3.4	66.4	2.9
Saskatchewan	71.6	-1.6	65.1	-3.7
Manitoba	71.0	8.0	63.0	1.1
Ontario	69.5	1.9	65.9	2.2
Quebec	70.6	2.8	67.2	2.9
New Brunswick	55.4	-2.3	57.5	-0.1
Nova Scotia	66.4	1.4	62.7	1.6
Newfoundland	74.5	-0.8	68.4	-5.0
Prince Edward Island	49.5	9.5	52.9	3.3
Northwest Territories	65.4	3.8	68.7	-1.9
Yukon	65.7	5.6	68.3	0.2
Canada	67.8	1.8	66.2	1.7

* Note: Based on the operating results of 222,195 rooms (unweighted data).
^ Percentage points.
[1] Excluding Alberta resorts.
Source: PKF Consulting Inc. with reproduction and use of information subject to PKF Disclaimer and Restrictions as detailed at www.pkfcanada.com.

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